



THE COMMONWEALTH OF MASSACHUSETTS

State Board of Retirement

ONE ASHBURTON PLACE, BOSTON, MA 02108-1607

BENEFICIARY SELECTION/CHANGE OF BENEFICIARY FORM

TO THE BOARD OF RETIREMENT:

SSN# _____

In accordance with the provisions of Section 11 of Chapter 32 of the General Laws I, _____, a member of the State Employees' Retirement System, hereby nominate the following-named beneficiary or beneficiaries in the proportion designated or in the alternative other beneficiaries to receive any sum referred to in said Section 11 due at the time of my death:

BENEFICIARY INFORMATION

| | | | |
|-------------------|-------------------------------------|---|--------------------------------|
| Name: | Designation: | Proportion:* | Date of Birth: |
| Street: | <input type="checkbox"/> Primary | <input type="checkbox"/> All | Relationship: |
| City, State, ZIP: | <input type="checkbox"/> Contingent | <input type="checkbox"/> _____ % (Percent) | Beneficiary Social Security #: |
| Name: | Designation: | Proportion:* | Date of Birth: |
| Street: | <input type="checkbox"/> Primary | <input type="checkbox"/> All | Relationship: |
| City, State, ZIP: | <input type="checkbox"/> Contingent | <input type="checkbox"/> _____ % (Percent) | Beneficiary Social Security #: |
| Name: | Designation: | Proportion:* | Date of Birth: |
| Street: | <input type="checkbox"/> Primary | <input type="checkbox"/> All | Relationship: |
| City, State, ZIP: | <input type="checkbox"/> Contingent | <input type="checkbox"/> _____ % (Percent) | Beneficiary Social Security #: |

The right to change any beneficiary is reserved. This may be done by filing a new form. If you are naming contingent beneficiaries, please stipulate.

The types of payment to the beneficiary(ies) you designate with this form that are covered Section 11 include:

Before your retirement –

1. The payment of the accumulated total of deductions credited to your account in the annuity savings fund at the date of your death.

Following your retirement –

1. The payment of any cash refund due at your death if your retirement was elected under Option (B).
2. The payment of any prorated monthly amount due at your death if your retirement was elected under either Option (A) or Option (B).

**Election of a beneficiary under Option (C) (the survivorship allowance) is NOT made on this form.
Such election is made on the Option Selection Form.**

| | |
|------------------------------|-----------------------------|
| _____ (Date Signed) | _____ (Member Signature) |
| _____ (Department/Agency) | _____ (Address) |

| | |
|------------------------|------------------------------|
| _____ (Date Signed) | _____ (Witness Signature) |
| | _____ (Address) |



GENERAL INFORMATION

The nomination of one or more beneficiaries may be changed from time to time by filing a new form.

Payment or proportionate payments to any beneficiary or beneficiaries will be paid in one sum.

A beneficiary nominated by a minor must be of his kindred. If a minor is designated as a beneficiary, payment will be made to the guardian of such minor.

AFTER THE DEATH OF A MEMBER:

1. The amount of any accumulated total deductions credited to the member's account in the annuity savings fund is payable in one sum or in proportionate sums to the surviving beneficiary or beneficiaries, except that in any case where the deceased member is survived by a widow and/or children eligible to receive benefits under the provisions of Section 12B or 12(2)(d) an election by such widow or by a guardian on behalf of such children to receive such benefits shall have preference over the right of any beneficiary named on this form. This provision is not applicable after retirement allowance has become effective for a member.
2. The amount of any cash refund due under Option (B) shall be paid to the surviving beneficiary or beneficiaries. Payment to any beneficiary or beneficiaries shall bar the recovery of such payment by any other person. If no beneficiary has been named or if no beneficiary survives, any sum due at the death of a member shall be paid to the legal representatives of such member.
3. If the sum does not exceed \$300 the State Board of Retirement may make payment, after the expiration of 90 days, to the person or persons appearing in its judgment to be entitled thereto; provided that no written demand by a duly appointed executor or administrator has been made, nor probate proceedings have been commenced. Any action taken by the State Board of Retirement within the provisions of Section 11 shall constitute a legal settlement of all claims on account of amounts payable under such section.
4. The prorated monthly amount due upon the death of the member under Option (A) or Option (B) is payable to the beneficiary or beneficiaries named on this form. Any such payment will constitute a legal settlement of all such claims and shall bar recovery by any other person.
5. Separately, you may designate a single beneficiary to receive a monthly survivor allowance calculated as if you had retired on the date of your death pursuant to G.L. c.32, §12(2)(d). You may only designate certain individuals to be a beneficiary for a survivor allowance. The beneficiary must be a spouse, child, parent, sibling, or former spouse who has not remarried. Designation of a beneficiary other than a spouse for this purpose must be done on a separate form. Please contact the State Board of Retirement for further information.